

Your Name: \_\_\_\_\_  
Your Address: \_\_\_\_\_  
Your Street, City, Zip Code: \_\_\_\_\_  
Your Telephone Number: \_\_\_\_\_  
State Bar Number (attorneys only): \_\_\_\_\_  
Represents ☐ Self (Without a Lawyer) OR ☐ Attorney for \_\_\_\_\_

**SUPERIOR COURT OF ARIZONA  
MARICOPA COUNTY**

In the Matter of the Conservatorship of \_\_\_\_\_

Case Number: PB \_\_\_\_\_

☐ an Adult or ☐ a Minor

**ORDER TO CONSERVATOR(S)  
AND ACKNOWLEDGMENT**

The welfare and best interest of the person named above ("your protected person") are matters of great concern to this Court. By accepting appointment as conservator you have subjected yourself to the power and supervision of the Court. Therefore, to help avoid problems and to assist you in the performance of your duties, this order is entered. You are required to be guided by it and comply with its provisions, as follows:

1. Immediately locate, identify and inventory all of the assets of the protected person and make proper arrangements for their protection, such as changing the locks on the house, renting a safe deposit box for important documents, etc.
2. File your formal Inventory with the Court no more than 90 days after your appointment as conservator. If you are filing it without an attorney, be sure to put the case name and number on all papers you file with the Court.
3. Immediately begin to take title to all of the protected person's property. The property should be titled in the name of the conservatorship: (Your name) as Conservator(s) of the estate of (Protected Person's Name), or (Protected Person's name by your name), Conservator. Do not put the protected person's funds into joint accounts, trust accounts ("in trust for"), or payable on death (POD) accounts. Do not list yourself as beneficiary on any bank accounts or other assets belonging to the protected person.
4. Keep detailed records of all receipts and expenditures you make on behalf of the protected person, including bills, receipts, bank statements, tax returns, bills of sale, promissory notes, etc. Open a separate conservatorship checking account for deposit of your protected person's income and other receipts, and payment of his/her bills and expenses. Avoid dealing in cash.

5. Establish a budget, pay the protected person's debts when they become due, and properly invest the protected person's assets. You may hire accountants, attorneys and other advisors to help you carry out your duties as the size and the extent of the conservatorship estate may dictate.
6. Keep detailed records of the time you are spending in identifying, managing and protecting the conservatorship estate in case you later decide to ask the Court to be paid for your time from the conservatorship estate.
7. Record certified copies of your Letters of Conservatorship with the County Recorder in each county where the protected person owns property in order to protect title to those properties.
8. If the Court has ordered you to place funds in a restricted account, you must immediately file a receipt from the bank or financial institution showing that you have deposited the money in an account which the bank has restricted in accordance with the Court order. The receipt should include the name and address of the financial institution, the type of account, the account number and the amount deposited.
9. File an annual accounting with the Court no later than one year from the date you were appointed (and each year on the anniversary date of your appointment) showing everything the protected person owned when you were appointed; all sums and property received since your appointment itemized by date, source, purpose and amount; and all expenditures made since your appointment, itemized by date, payee, purpose and amount; and the balance on hand at the end of the accounting period.
10. **NEVER** use any of the protected person's money or property for any reason other than the protected person's direct benefit. You may not profit in any way from access to the protected person's assets. You have a legal duty of undivided loyalty to the protected person. Neither you, your friends, nor other family members may profit by dealing in the assets of the conservatorship estate. You must be cautious and prudent in investing the protected person's assets.
11. You must not make speculative investments. Do not purchase merchandise or services which the protected person would have considered extravagant or inappropriate for his/her lifestyle prior to your appointment. Use the assets to maintain the safety, health and comfort of the protected person, bearing in mind that the protected person may have no additional sources of income for the remainder of his/her life.
12. All conservatorships terminate on the death of the protected person, the depletion of his/her conservatorship estate or upon the minor protected person's reaching 18 years of age. Court proceedings and a final accounting are **required** before you can be discharged as conservator and your bond exonerated (canceled).
13. If you have any questions as to your duties as a conservator, contact an attorney who handles conservatorships **before** taking any action.

THIS IS ONLY AN OUTLINE OF **SOME** OF YOUR DUTIES AS CONSERVATOR. IT IS **YOUR** RESPONSIBILITY TO OBTAIN PROPER LEGAL ADVICE ABOUT YOUR DUTIES. FAILURE TO DO SO MAY RESULT IN PERSONAL FINANCIAL LIABILITY FOR ANY LOSSES.

**WARNING: FAILURE TO OBEY THE ORDERS OF THIS COURT AND THE STATUTORY PROVISIONS RELATING TO GUARDIANS AND CONSERVATORS MAY RESULT IN YOUR REMOVAL FROM OFFICE AND OTHER PENALTIES. IN SOME CIRCUMSTANCES, YOU MAY BE HELD IN CONTEMPT OF COURT, AND YOUR CONTEMPT MAY BE PUNISHED BY CONFINEMENT IN JAIL, FINE, OR BOTH.**

DATED: \_\_\_\_\_

\_\_\_\_\_  
Judge/Commissioner

**ACKNOWLEDGMENT: THE UNDERSIGNED ACKNOWLEDGES RECEIVING A COPY OF THIS ORDER AND AGREES TO BE BOUND BY ITS PROVISIONS, WHETHER OR NOT HE OR SHE READ IT BEFORE SIGNING, AS LONG AS HE OR SHE IS CONSERVATOR(S).**

\_\_\_\_\_  
Signature of Conservator

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Signature of Conservator

\_\_\_\_\_  
Date Signed